

Introduction to Reference Work

What is Reference Service?

Information services in libraries take a variety of forms including direct personal assistance, directories, signs, exchange information culled from a reference source, readers' advisory service, dissemination of information in anticipation of user needs or interests, and access to electronic information. (Reference and User Services Association - ALA division)

<http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/definitionsreference.cfm>

- the primary task of the reference librarian is to locate or aid the user in locating materials that help to address an information need

Types of Reference Service

- Two general categories of information needs:
 - known item request
 - non specific request for information (e.g. user seeks information about a subject)
- Four category division:
 - Direction
 - Ready Reference
 - Specific Search Question
 - Research Question

Aspects of Reference Service

- Information
 - the reference librarian must be aware of what is and is not available in the library
- Guidance
 - reference librarians will guide users to the most useful resources for answering their questions
- Instruction
 - reference librarians provide classes and workshops in the use of library materials and in the research process (called Bibliographic Instruction or BI)

Reference Service Guidelines

1. Be approachable
2. Show interest
3. Conduct a reference interview
4. Conduct a search
5. Follow up

Delivery of reference service

- Face-to-face
- Telephone
- Mail, Fax
- Classroom (academic librarian)
- lab and working area (special librarian)
- Email, Chat, IM

Reference Journals

- RQ (Reference & User Services Quarterly)
- Journal of the Reference and User Services Association (RUSA) a division of ALA
- Reference Services Review

Web Resources

- New RUSA site: <http://www.ala.org/ala/mgrps/divs/rusa/index.cfm>
- LIBREF-L (a mailing list)

Reference Services

- Information
 - Ready-reference questions
 - Bibliographic verification
 - Interlibrary loan and document delivery
 - Information and referral services (I&R)
 - Research questions
 - Fee-based services and information brokering

- Guidance
 - Reader's advisory services
 - formal reading lists (subject based or "if you like this author you might also like...")
 - bibliographies and reference lists on topics of common interest
 - Term-paper counselling
 - Selective dissemination of information (SDI)
 - current awareness service
 - Bibliotherapy
 - clinical - hospital
 - developmental - school, public library
- Instruction (BI or Bibliographic Instruction)
 - One-to-one instruction
 - evolves out of a reference interview
 - first-timer: use of reference tools
 - organization and scope of the tool
 - learn by doing/demo
 - Group instruction
 - library tour
 - course-related instruction
 - course-integrated instruction

Broad Classes of Reference Materials

- Bibliographies (e.g. Guide to Reference Sources)
 - National and Trade Bibliographies (e.g. Books in Print)
- Indexes and Abstracting Services
- Encyclopedias
- Ready Reference
 - Almanacs
 - Handbooks
 - Yearbooks
 - Directories
- Biographical Sources (e.g. Who's Who)
- Dictionaries (e.g. Oxford English Dictionary)
- Geographical Sources (Atlases, Maps, etc)
- Government Documents (e.g. census records, statistics)
- Corporate Documents (e.g. annual report)
- Serials (Journals and Magazines)
- Monographs (Books)

Reference Interview

- Definition: "An information contact that involves the use, recommendation, interpretation, or instruction in the use of one or more information sources, or knowledge of such sources, by a member of the reference or information staff." (Reference and User Services Association, ALA)
- The objective of the reference interview is to find out what and how much information the person is seeking
- harder than it sounds
- majority of queries are directional or ready reference (easy to answer, easy to frame intelligently)
- users do not want to show ignorance

Conducting a Reference Interview

- be approachable
- focus on the patron
- have open nonverbal language
- project a positive attitude
- maintain eye contact
- ask open ended questions (not yes or no questions)
- avoid jargon

Characteristics of Reference Librarians

- discipline
 - ability to translate between disciplines and areas of knowledge
 - jargon is common in all fields, but the user may not be familiar with it
- a desire to help
- sensitivity
- patience
- broad knowledge
 - while a reference librarian does not have to be an expert in all fields a good general knowledge of broad areas of study is extremely useful
 - subject specialists in academic libraries may need more training in their subject area, a knowledge of how to search is often not enough
- knowledge of reference sources

Steps in the Reference Interview

- open the interview
 - smile (very effective)
 - ask "How can I help you"
 - no matter how tired you are, try to never dismiss a user's question
 - a bad first impression is hard to erase
- negotiate the question
 - the user's initial question may seem simple, but this may be a starting point for more in depth research
 - this involves gaining the user's trust, for example by indicating that you consider their question worthy of investigation, even if it seems simple
 - discuss the question with the user to ensure that you understand the meaning of the question (natural language is ambiguous)
- search for the information
- communicate results
 - make sure the user is satisfied with the answer
 - does the answer completely answer their question or do they need suggestions for where to continue their search
- close the interview
 - tip: always end an unsuccessful interview with a referral

Negotiating the Question

- open questions: questions which require more than a yes or no, these are the best to ask early in the process because they allow the user to explain what their question means to them
- closed questions: yes or no questions
- neutral questioning
- encouraging
- active listening
- asking why

Steps in Answering a Reference Question (Searching for Information)

- understand the question
- brainstorm for keywords and controlled vocabulary to use in the search
 - this same process is undertaken for web based searching as well
- check an index or thesaurus for good controlled vocabulary
- know which reference sources to search
 - bibliographies
 - catalogue
 - ready reference sources (almanacs, etc)
 - encyclopedias, databases

- specialised reference materials
 - subject specific materials
 - books/cds/etc.
- keep a record of the search process so the search can be repeated

Communicating Results

- results must be in a format and form the user can use
- results need to be written in language the user can understand
- results should match the user's information need
- librarian must determine how much assistance the user requires
 - does the user just want the results
 - will the user do the search after the librarian provides bibliographic instruction
- how extensive should the result set be and how much bibliographic information is necessary

Other Reference Issues

- Reader's Advisory Interviews
- Remote Reference (telephone or electronic)
 - lose body language cues showing agreement or lack of agreement
 - may require more back and forth consultation with user as a user physically in the library often takes preference
- Imposed queries
 - homework and class projects
 - questions asked on behalf of another person
 - the librarian is not dealing with the person who has the information need, but a proxy, it is thus harder to determine the true question
- Angry or upset users

Bibliographic Instruction (BI)

- instruction involves teaching users the techniques necessary to use reference materials effectively
- also includes teaching users how to search in general and how to use specific interfaces

Approaches to BI

- library orientation
- library instruction
- bibliographic instruction
- information literacy instruction

Instructional Methods

- reference interview
- lecture/discussion
- demonstration
- active learning
- collaborative learning
- handouts and prepared tutorials
- exercises and assignments

Evaluating Reference Sources

- Purpose
 - examine contents
 - examine introduction or preface
 - examine the index to sample topics covered
- Scope and Correctness
 - what is covered? is it comprehensive or specific to a single topic?
 - does the work fill gaps in the library's reference collection
 - how often is it updated?
- Audience
 - for experts or the average citizen?
 - for children or adults?
- Cost
 - important issue since a library has a finite budget
- Format and Arrangements
 - electronic versus print
 - how is it organised?
 - illustrations?
- Authority/Objectivity
 - who wrote it/published it?
 - bias or slant to the contents (e.g. corporate publications)
- For electronic resources
 - examine system requirements
 - how is data accessed?

- cdrom or online
- usefulness of search tools

Current Issues and Trends in Reference

- Networked library systems
 - local, national and international union catalogues
 - many district/regional libraries have combined catalogues
 - ILL services allow libraries to share outside local or national boundaries
- Electronic reference services/Virtual reference
 - reference by phone, fax, teleconference
 - reference by email, IM, SMS
 - document delivery
 - electronic document delivery
- Issues: Stress and burnout
- Staffing: paraprofessional support & computerized system
- Evaluation and performance appraisal: 55% rule
- Information Ethics and Censorship
- Access to information
- Future:
 - role of librarian: personal helper -> interface designer/engineer
 - select and organise information to enable search
 - determine authoritativeness/currency
 - virtual service points
 - user-centred service
 - read the RUSA Blog <http://rusa.ala.org/blog/>
 - **Virtual Reference on YouTube:** <http://www.youtube.com/watch?v=O-qujBrz8W4>